

How to integrate your Ruby & Clio accounts.

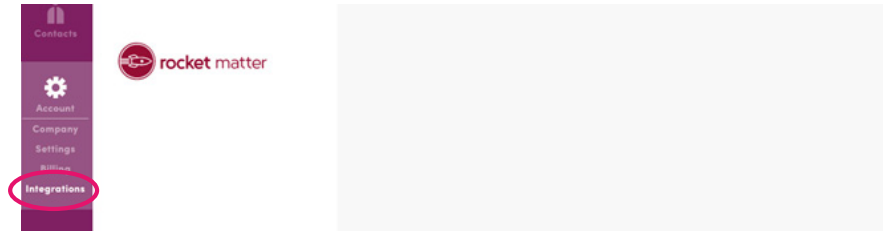


Automatically have your Ruby call, message, and voicemail data sent to your Clio account, making it easy to associate client communication with specific matters. You'll save time and get more done with all your clients details in one place!

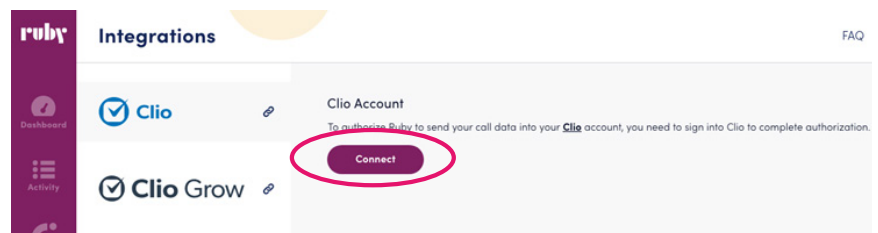
01

BEGIN SETUP

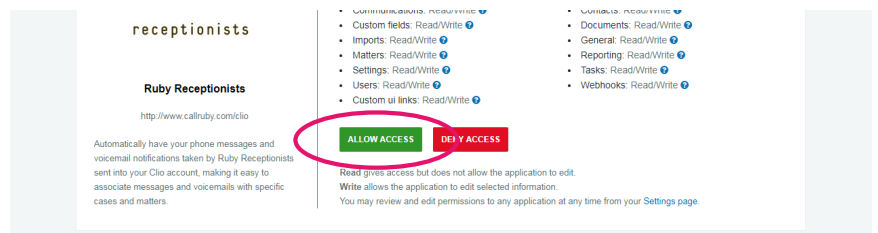
From the my.ruby.com Dashboard click on **"Integrations"** under the Account section.



Click **"Connect"** to open up your Clio account and sign in.



Click **"Allow Access"** to authorize Ruby to send your calls to Clio.

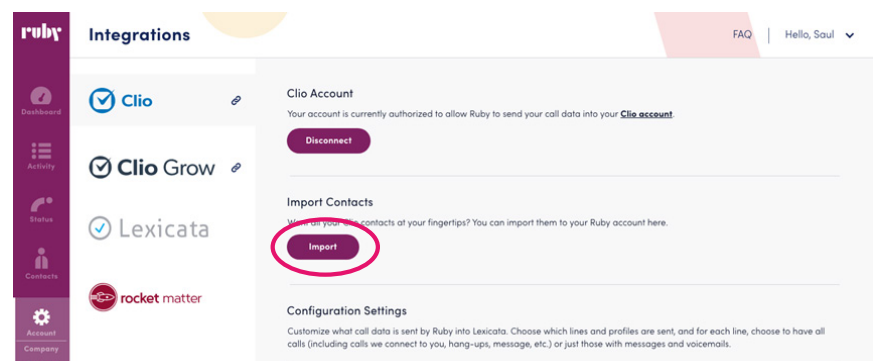
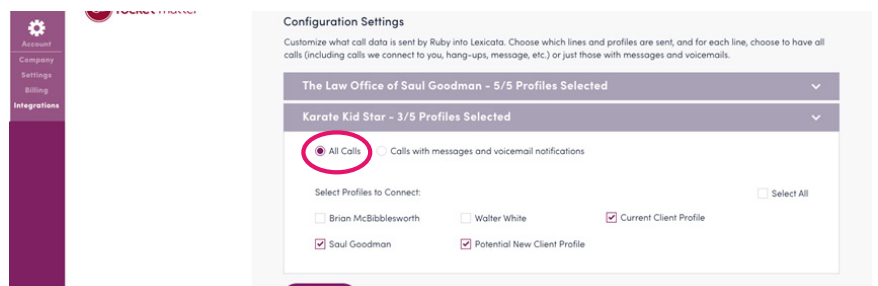


02

IMPORT CONTACTS & CHANGE SYNC OPTIONS

Once connected, all your Ruby calls will sync to your Clio account by default. You have the option to select between **"All Calls"** and only calls that contain a message or voicemail. Additionally, you may select specific call profiles from the drop down directory you would like connected to Clio.

If you click **"Import"** our system will collect your Clio contacts with a phone number and add them to your Ruby Contacts. This adds the ability to assign a call to a contact or matter in Clio with the extra benefit that our receptionists will have the most accurate caller information while on a call for your firm.



03

YOUR CLIO COMMUNICATIONS

Under “**Communications**” in Clio, notifications from Ruby will display in the Logs. Your calls will always be listed from “**Ruby**” making it easy to find those messages.

Ruby’s system will look for a caller’s information in your Clio contact list. If we’re able to match first and last name, as well as the number called from, we can associate the call or message with that contact making organization of matters and communication a breeze.

Actions	Hours	Type	Date	Subject & body	Matter
Edit	0.25	📞	10/17/2018	Mr. Hootie - - Ruby Mail - ----- Call I...	Q
Edit	0.60	📞	10/17/2018	Crystal - Ruby - Ruby Mail - ----- Call...	-
Edit	0.25	📞	10/12/2018	Receptionist-handled call, - ----- Cal...	Q
Edit	Add time	📞	10/12/2018	Test - - Ruby Mail - ----- Call Informa...	-
Edit	Add time	📞	10/12/2018	Crystal - Ruby Mail - ----- Call Infor...	-
Edit	Add time	📞	10/11/2018	Crystal - Ruby Receptionists - Ruby Maj...	-
Edit	Add time	📞	10/11/2018	Evan - Ruby Receptionists - Ruby Mail ...	-
Edit	Add time	📞	10/11/2018	Holly - - Ruby Mail - ----- Call Inform...	-
Edit	Add time	📞	10/10/2018	Test - - Ruby Mail - ----- Call Informa...	-

04

VIEW CALL DETAILS

Expanding the Communications Log displays additional call details, including total call duration. By clicking ‘**Add Time**’ you can easily track duration and bill for the time spent on the phone with a client.

Communications [Add secure message]

Logs | Secure Messages

All | Phone | Email | Filter by keyword

Actions	Hours	Type	Date	Subject & body	Matter	From
Edit Add time		📞	10/10/2018	Sara Allen - - Ruby Mail - ----- Call Information ----- From Caller Id: Sara Allen From Caller Number: 1 (206) 826-2626 Date: 10/10/2018 11:51:11 AM Total Call Duration: 00:03:30 Receptionist Duration: 00:02:30 ----- Call Message ----- From Name: Sara Allen From Number: From Company: Regarding: Sara mentioned that she wanted to set up a consultation with Alexis or Alexandra in regards to a child support order. She was referred by Kathleen Actions: Sent To Voicemail To: Goodman, Saul The Law Office of Saul Goodman Date: 10/10/2018 11:53 AM Caller ID: Seattle WA - 1 (206) 826-2626 Ruby Receptionist: Kenzie ----- Voice Mail Link ----- https://app.clio.com/irs/documents/131...	-	Ruby Recepti...

